EXHIBIT B

Summary –Periodicals Titles (PE) Database Users Survey

Introduction

Two online surveys (one for library staff[1] and one for all other library users[2]) were made available from the Library of California Periodicals Titles (PE) database from May 6 - June 4, 2002. The goals of the survey were to learn how and why users currently use the PE database and gather suggestions for future improvements. The survey was conducted in the following contexts first the transition of the Melvyl Union Catalog and the PE database to new supporting technology; second the Library of California's interest in understanding how the database is used. The total number of respondents was 546 (123 library staff and 423 from other users).[3]

Demographic Information

40% of the library staff were from UC and 30% from other colleges/university libraries; 55% of the other library users were UC students and faculty (see Table 1: Demographic Information). 90% of all respondents were California residents. The majority of the library staff used it daily or once a week whereas most other users used PE either once a week or once a month, (see Table 2: Frequency of Use).

Uses of the PE Database

Respondents were asked to choose as many uses as applied from a list of why they use the PE database (the library staff survey had more choices). Library staff primarily (82%) use PE to find out if another library owns an item, 58% to help patrons find items, and 55% for citation verification. 60% of all other users use PE to find out if an item is available online, 60% to find out if their library owns a periodical and 45% use PE to find out if another library owns an item. (See complete data in Table 3: Uses of the Periodicals Database.)

Library staff responded that most items they have found in PE were held at UC libraries (78%), followed by 8% at other college/universities and 4% at the California State Library. (See Table 4: Holdings Information for Items Found in PE.)

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[1] Includes UC and non-UC library staff
[2] Includes UC faculty and students and non-UC users
[3] **Surveys (no longer activated) available at**:
Librarian and Library Staff - http://www.cdlib.org/about/pedatabaselibrarystaff.htm
Other users - http://www.cdlib.org/about/pedatabasepublic.htm
Complete Results available at:
Librarian and Library Staff - http://www.cdlib.org/about/pestaff/
Other users - http://www.cdlib.org/about/pepublic/

Both groups were asked to rank in order of importance the following 3 features/functions (see Table 5: Rank Current PE Features):

Limit searches to a specific library
54% of library staff felt limiting searches to a specific library was very important or somewhat important, while 20% found it not very important. 66% of other users found this feature very important or somewhat important.

Limit searches to a type of library (e.g., public, academic, special)
Other users and library staff stated that the option to limit searches to particular types of libraries (e.g., academic, public, etc) was either not very important or a feature they had never used.

Limit searches by geographical region (e.g., Greater Bay Area, Central Valley)
49% of library staff felt that limiting searches by geographical regions was very important or somewhat important; 24% felt it was not very important. 41% of other users felt it was very important or somewhat important; while 20% felt it was not very important.

Local Library Catalog vs. PE

Both groups were asked to explain why and when they used their local library catalog first vs. the PE database first. Library staff and other library users both gave similar responses, but their responses were ranked in a different order of importance. (See Table 6: Local Library Catalog vs. PE for details.)

When/why do you use your own library catalog first (top answers)
Library staff
    1. Use it to check for local holdings
    2. Use it when I'm sure an item will be in my local catalog
    3. Never use my local library catalog first
All other users:
    1. Never use my local library catalog first
    2. It is more convenient to use
    3. Use it to check for local holdings

When/why do you use PE Database first (top answers)
Library staff:
    1. To check for holdings (primarily at other institutions)
    2. Use it when I'm sure my local library does not have an item
    3. Never check PE first
All other users:
    1. It is easy to use
    2. To see if full text is available online
    3. Because PE has richer content than my local library's catalog

What New Features Do Users Want

Between 45-50% of respondents answered the final question of what features are currently **not** available in PE that they would like to see in the future. Their responses are summarized into the following categories: search functionality; content; other functionally; display of results; interface; and other issues. Below are the top issues raised by each group for each category (see Table 7: Future Features Wanted for the complete summary of results).

Overall, for library staff and other users the proportion of responses per category was the same, however, for some categories, the two groups raised different issues. The percentages below are based on the total number of responses to this question (70 for library staff; 201 for other users).

Search Functionality [34% library staff; 34% other users]
Library staff primarily mentioned call number searching and the ability to limit searches to full text as desired features. For other library users the most noted issue was that they wanted author and article title searching (clearly demonstrating the misunderstanding that many users have, thinking that PE is an article citation database), then they wanted abbreviated title searching (i.e. search for the terms Inorg. Synth.), better exact title searching, citation-specific searching (such as Pubmed allows), keyword searching, better truncation options and the ability to limit to full text.

Content: [15% library staff; 15% other users]
Library staff were primarily concerned that PE provide holdings information from more institutions; content issues raised by other library users primarily related to wanting access to more full text online and for online access to be available to the general public.

Other Functionality [13% library staff; 10% other users]
For library staff and other users the primary issues raised were the ability to perform an ILL order online and to view library circulation status.

Display Results [19% library staff; 5% other users]
Both library staff and other library users wanted to easily display ISSN numbers; in addition library staff wanted to display OCLC numbers.

Navigation [7% library staff; 3% other users]
Library staff wanted links to online library OPACs; for other users there was no clear consensus of issues raised (see Table 7: Future Features for list).

Interface [4% library staff; 5% other users]
Several library staff suggested moving the submit button to higher up on the search page; other library users suggested reducing the number of screens that you need to go through to access full text.

Other [other users 7%] (only applied to other users)
Primarily asking for alternative access to periodical titles through lists; e.g., alphabetical list of journal titles with library holdings and titles organized by subject.

No comment or first time users: [7% library staff; 20% other users]

APPENDIX

Table 1: Demographic Information

Other Users	Library Staff
40% UC students	**40%** UC
15% UC faculty	**30%** Other College/University
10% general public	**15%** Corporate/Special Libraries
9% UC alumni	**10%** Public Libraries
8% Other	**5%** Other Libraries
7% Other college/university	**4%** Medical Libraries
6% UC Staff (non-library)	
Under 5%: Other College/University Faculty and Staff and k-12 student	

*Total UC users: 61%; Total Non-UC users: 39%

Table 2: Frequency of Use

Other Users	Library staff
40% once a week	**55%** daily
22% once a month	**31%** once a week
16% daily	**8%** once a month
12% first time use	**4%** rarely
10% rarely	**2%** first time

Table 3: Uses of the Periodicals Database

Other Users	Library Staff
Why do you use the Periodicals Database (choose as many as apply)	
60% to find out if it is available in full text online **60%** to find out whether my library owns a periodical **45%** to find out if another library owns it **20%** other	**82%** to find if another library owns it **58%** help patrons **55%** citation verification **40%** discover how many other libraries own an item **35%** to find out if a periodical is available in full text online **26%** find out whether my library owns a periodical **24%** collection development **20%** cataloging **12%** other

Table 4: Holdings Information for Items Found in PE (asked of Library Staff only)

78% UC Libraries
8% Other College/Universities
4% California State Library
3.5% Medical Library
3.5% Public Library
1% Corporate Library
1% Other

Table 5: Rank Current PE Features

Other Users	Library Staff
Limit search to specific Library	
45% very important	36% very important
21% somewhat important	20% not very important
12% important	18% somewhat important
11% not very important	10% important
7% never used	9% never used
4% not important	7% not important
Limit to type of library	
29% not very important	30% not very important
21% never used	18% never used
14.5% very important	17% not important
13% somewhat important	14% important
11% not important	11% somewhat important
11% important	10% very important
Limit by geographical region	
24% very important	26% somewhat important
20% not very important	24% not very important
17% somewhat important	23% very important
16% never used	10% not important
15% important	10% important
8% not important	9% never used

Table 6: Local Library Catalog vs. PE (the responses below are ordered by frequency of response—the most frequently occurring is higher on the list)

When searching for periodicals, why and when do you consult your local library first?	
Other Users	**Library Staff**
1. Never use local library first 2. Use local library first because it is convenient; when I find the item I'm already there 3. Use local library first when I'm checking for holdings 4. I always use my local library first (no specific reason given why) 5. I start with other sources first; e.g., A&I databases, ejournal lists compiled by librarians 6. Use local library first when I know it has the item I'm searching for	1. Use local library first when I'm checking for holdings 2. Use local library first when I know it has the item I'm searching for 3. Never use local library first 4. I always use my local library first (no specific reason given why) 5. Use local library first because it is convenient; when I find the item I'm already there 6. Use local library first because helping patrons and they want to know what they can access immediately

When searching for periodicals, why and when do you consult the Periodicals Database first?	
Other Users	**Library Staff**
1. Use PE first because it is easy to use, (convenient, nice interface, better than my local catalog; good search engine) 2. Use PE first when I want to see if an item is available online 3. Use PE first because it has the most complete content; obscure, hard to find journals 4. Use PE first to check holdings 5. Use PE first (no reason given) 6. Use PE first when I'm sure my local library doesn't have it 7. Never use PE first	1. Use PE first to check holdings (at other libraries, primarily) 2. Use PE first when I'm sure my local library doesn't have the item 3. Never use PE first (no reason given) 4. Use PE first because it has the most complete content 5. Use PE first because it is easy to use, (convenient, nice interface) 6. Use PE first when I want to see if an item is available online

Table 7: Future Features (based on 70 responses of library staff and 201 responses by other library users)

Note
1. The numbers in parentheses represent the number of respondents who raised the issue, if there is no number then it was raised by only one person.
2. Items in *italics* indicate features that are in fact currently in PE and items in **bold** are those that will be in the new Melvyl Catalog.

Other Users	Library Staff
SEARCH FUNCTIONALITY	
1. Provide article-level searching; author, title, and/or subject search capabilities (13)* 2. Provide abbreviated titles searching - i.e. inorg. synth. (10) 3. Provide citation-specific search, as on PubMed. For example, enter a particular journal issue, volume, and page number and find the exact citation (6) 4. Improve "exact title" functionality (6) **5. Provide keyword search ability (4)** ***6. Provide better truncation search features (i.e. allow exact start with truncations after or use truncation on first or second word of a title) (4)*** **7. Limit search to periodicals that are available online (4)** ***8. Provide subject searching (2)*** **9. Provide language limits (2)** **10. Provide limits such as 1800-1900, 1800-1850; better date limits (2)** ***11. Provide search by ISSN (2)*** 12. Suggest corrections for misspelled titles 13. Ability to search related records as is possible in other commercial databases like Web of Science 14. Provide the ability to see a default view that would search one's campus library only **15. Provide search by journal publisher** **16. Search by call numbers** 17. Ability to initiate search based on a user-created subject area	**1. Call number searching (4)** **2. Limit to full text (3)** **3. Search publisher (2)** **4. Search place of publication (2)** *5. Right hand truncation* 6. Abbreviated title searching **7. CDL record id number** **8. Search languages** 9. More specific geo, e.g., county 10. Volume specific searching **11. Keyword adjacency** **12. Search So Ca UCs** ***13. "add on" searching with Boolean operators*** ***14. Limit by format*** *15. ISSN Number* ***16. subject searching*** ***17. date limits***

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* This comment clearly demonstrates the misunderstanding by some users that PE is an article citation database

Other Users	Library Staff
18. Provide the ability to do a subject search that is not limited to a specific periodical 19. Provide search by journal code 20. Provide search by ACCE 21. Provide search by PMID 22. Provide search by article length 23. Provide ability to locate most recent journals 24. Limit search to UC libraries only	
CONTENT	
1. Provide access to more full text online (11) 2. Provide full text access to the public (7) 3. Include non California library holding information (2) 4. Provide Table of Contents access (2) 5. Provide more and better non UC holdings information 6. Provide full texts online of older articles 7. I would like to know where the periodical is available online. For example, is the journal in EBSCO ACADEMIC or PROQUEST databases 8. Also, I've noticed that even when it says my organization (UC Davis) doesn't have PDF access to a particular title, I'll go in anyway and I find that I do have access **9. Provide a way for librarians to submit corrections or alert you of changes** **10. Provide access to online journals across the UC system, rather than varying by campus** 11. Provide access to abstracts for at least UC system alumni and State of California employees doing state work 12. Include archival references 13. Include complete holdings data from UC campuses	1. More accurate holdings information (2) **2. Keep CSU and Stanford holdings** 3. More public library holdings 4. Main British libraries holdings 5. Holdings info for non-California libraries 6. Table of Contents
OTHER FUNCTIONALITY	
1. Provide the option to order online periodicals through inter-library loan or desk top delivery (9) **2. Provide circulation status for all libraries (5)** **3. Link conference proceedings to call numbers**	**1. Request (online ILL) (3)** **2. Provide circulation status (2)** 3. Provide info about recent receipts (2) **4. Make it part of Melvyl** 5. Contact ILL/Document Delivery Services directly from PE

Other Users	Library Staff
4. Provide ability to recall an item	
5. Links to document delivery services at the various libraries.	
6. Provide the option that if I forget to activate my profile *before* I start the search, I can still retain my search results; or even better provide the ability to request a permanent "cookie" that would automatically activate my profile at the start of each session	
7. Printing of articles and citation pages using [Properties] in [Print] menu to print multiple pages per sheet and have the printer program not still charge by the sheet.	
8. **Combine Melvyl and PE**	

DISPLAY	
1. **Include ISSN (2)**	1. **Display ISSN in record (4)**
2. When something is in NRLF (or SRLF), it would be helpful if the info as to which NRLF is holding	2. Display OCLC # (3)
3. Perhaps a link to the journal whether or not my IP address/organization has access to it. Then, I can check out the site and see if it's possible to buy the article or become a member.	3. View vol and year correlation (e.g., v690=1999)
	4. Provide OCLC symbol for lending library
	5. **Change display easily**
	6. **Display review feature (title w/abbreviated owning library)**
4. List the abbreviated journal titles	7. *Show in long display which index indexes a journal*
5. **Include CODEN**	8. Display if it is available in microfilm and if it is available for borrowing
6. *Ability to view MARC records*	
7. Display PMID	
8. **Provide clear information regarding online volume availability**	
9. Improve the mechanism to specify a limited number of data points in the displayed set, i.e. title and ISSN only	
10. Provide the web equivalent of d cit.	

NAVIGATION	
1. *Links from CDL-hosted databases like BIOSIS to online sources, where applicable*	1. Link to holding library OPAC (3)
2. **Provide a way to allow you to go back to your search without having to click library location again.**	2. Link to WorldCat
3. **Provide option to enter a new search directly from the results page rather than having to go back to a new search page.**	3. Better links to outside databases

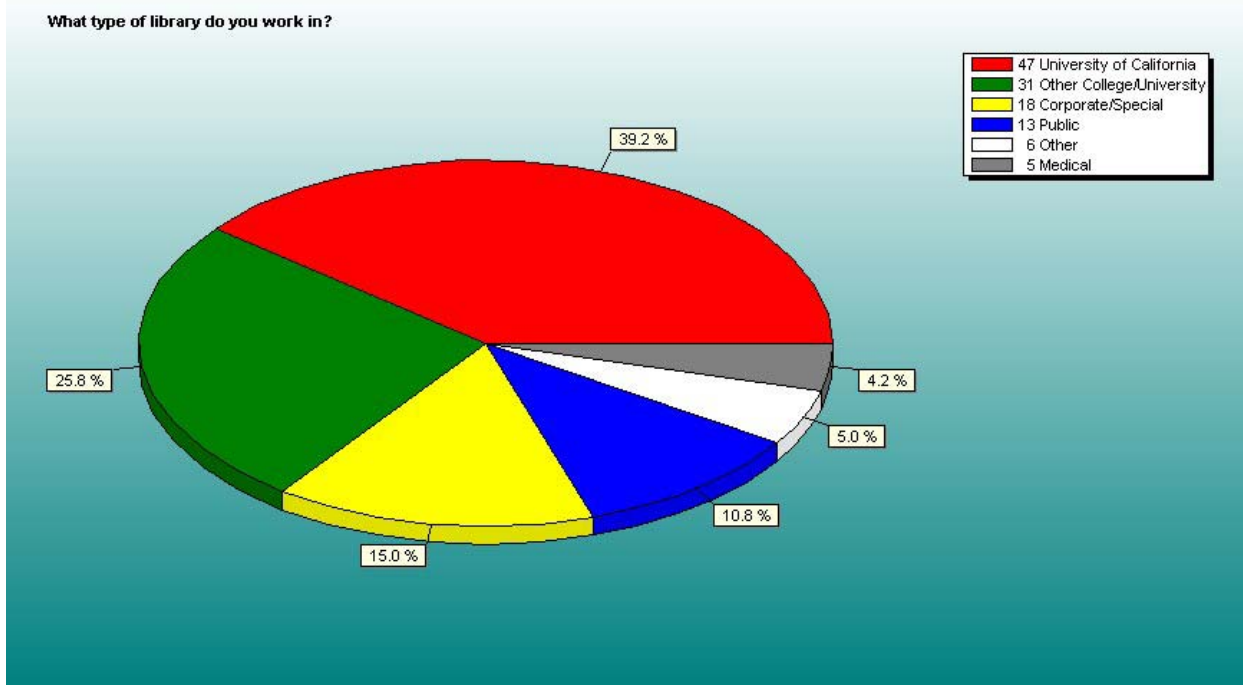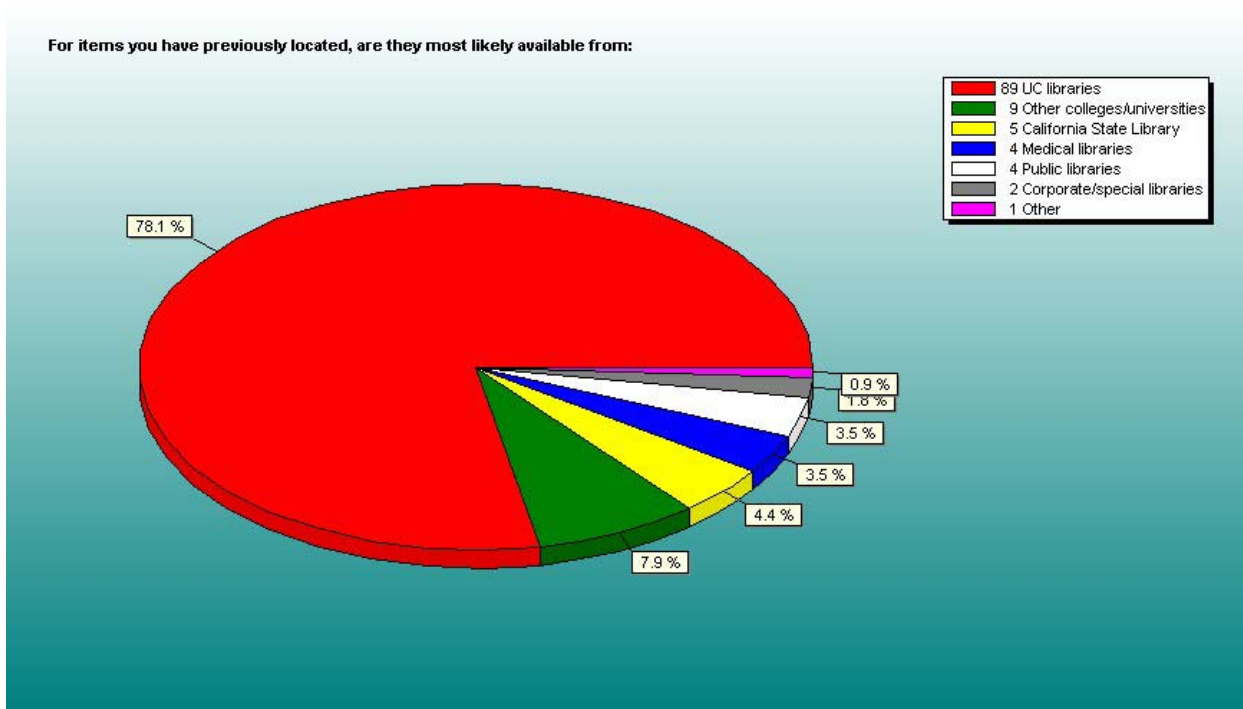| Other Users	Library Staff
4. I'd like to be able to bookmark the title-entry page for my campus so I can access articles just by entering the journal title. **5. Simplify call number access** 6. When I have found one article and go back for another, I always have to reset the search field from "electronic journals" to "title"	
INTERFACE	
1. Less screens to click through to access an online periodical (5) 2. Some of the holding institutions have cryptic names, provide a key 3. The American Physical Society web page is a good example 4. Get rid of the awkward pdf file names in JSTOR – they contain a lot of useless verbiage. A stable unique identifier is essential but the file name downloaded could just be jstorfirstpagenumber.pdf **5. Why doesn't the CDL interface interpret the Enter key as a click?** 6. A more serendipitous user interface	1. Move submit button (2) 2. Easy to read citations
OTHER	
1. Provide an alphabetical list of journal titles with library holdings (5) 2. Provide a list of available periodicals by subject (3) 3. Provide instructions or helpful hints (2) 4. Provide information about missing volumes and what other libraries have the missing volumes 5. Provide a list of new acquisitions and issues 6. Offer instructional classes 7. Provide SRLF requests status information **8. Prefer the telnet interface instead of the web interface because the web is too slow and annoying [there will be a telnet interface in the new Melvyl Catalog]**	

Selected Charts from PE Database Users Survey

What type of library do you work in?

Legend:
- 47 University of California
- 31 Other College/University
- 18 Corporate/Special
- 13 Public
- 6 Other
- 5 Medical

39.2 %
25.8 %
4.2 %
5.0 %
10.8 %
15.0 %

Chart 1

For items you have previously located, are they most likely available from:

Legend:
- 89 UC libraries
- 9 Other colleges/universities
- 5 California State Library
- 4 Medical libraries
- 4 Public libraries
- 2 Corporate/special libraries
- 1 Other

78.1 %
0.9 %
1.8 %
3.5 %
3.5 %
4.4 %
7.9 %

Chart 2